SF 1442 CONSTRUCTION CONTRACTS

PROCUREMENT PROCESS STEPS	PD^2 MENU PATH/ DOCUMENT TAB	LESSON/ TOPIC #	NOTES/SHOWSTOPPERS* *(Showstoppers are in bold/italics)*
Analyze the PR	Highlight the PR, then select **Procurement → Analyze** To define the rule, highlight the rule in question and click the [**View Rule Definition**] button.	Contracts Three/1 SAP Three/2	♦ The **Analyze** function checks: ⇒ CLIN description for possible Buy American Act exemption ⇒ FSC, SIC and WSC for possible class Set-Asides. ♦ The **Analyze function** validates the highlighted document against system-defined rules selected by the System Administrator (SA). ♦ *If an organization contained in a PR has not been approved, any award built from that PR cannot be released.*
Create a Milestone Plan	Highlight the PR, then select **Procurement→ Milestone Plan.** Select a Milestone Plan template or create a plan. Add and describe the milestones. Close and Save the Milestone Plan.	Contracts Three/3	♦ To set alerts for Milestone Due Dates select **Utilities → Preferences → Notification**.

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Create a Checklist	Highlight the PR then select **Procurement → Checklist** Select a template or create the checkpoints one by one. Close and Save the Checklist.	Contracts Three/2 SAP Three/1	
Create a Solicitation Mailing List (SML)	Highlight the PR, then select **Procurement → Pre-Award/Award → Solicitations → Solicitation Mailing List** Solicitation Mailing Lists can also be created as a stand alone without highlighting anything.	Contracts Three/5 SAP Three/4	♦ The SML finds vendors in the database that match the rotation criteria indicated upon creation. ♦ FSC and SIC are required values for vendor rotation. Other rotation criteria may be added. ♦ Vendors can be added to and removed from the SML using the **Vendors** menu. ♦ Vendors can be rotated (appended) to the SML by clicking the [**Rotate**] button. ♦ Mailing labels can be printed from the SML by using the **File** menu. ♦ *An award cannot be released if it contains an unapproved vendor. Unapproved vendors block the release of an award.*

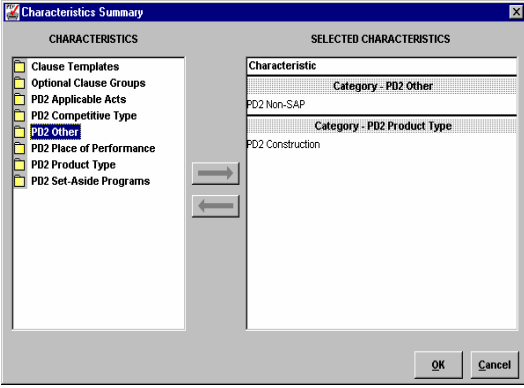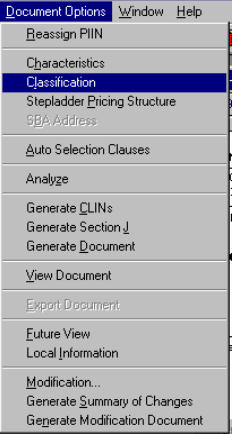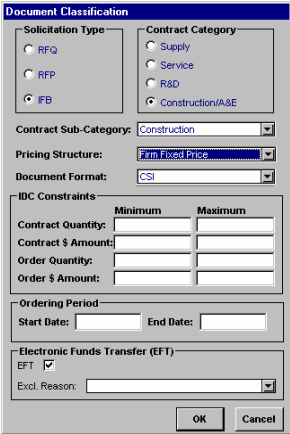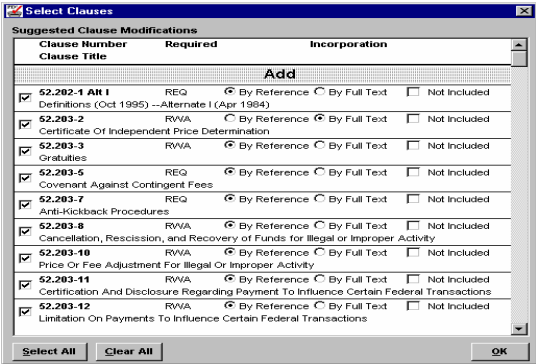| PROCUREMENT PROCESS STEPS	PD² MENU PATH/ DOCUMENT TAB	LESSON/ TOPIC #	NOTES/SHOWSTOPPERS* *(Showstoppers are in bold/italics)*
SF 1442 Construction Solicitation To create a Presolicitation CBD notice, first create an Initial SF 1442 solicitation **Reassign PIIN** Number: ABC123- 99 - B - 0014 Description: Visitor Center SF1442 Solicitation OK Cancel	Create a initial **SF 1442 Solicitation** by highlighting the SML, then select **Procurement → Pre-Award/Award → Solicitations → Construction Solicitation (SF 1442)** The **SF 1442 Solicitation** also can be created from a PR or as a stand-alone document. A solicitation can be renumbered by opening the document and selecting **Document Options →Reassign PIIN**. **Reassign PIIN** Number: ABC123- 99 - B - 0014 Description: Visitor Center SF1442 Solicitation OK Cancel Save and Close the solicitation.	Contracts Three/6 SAP Three/5	♦ The purpose of initial solicitations is to lock-in the solicitation number. ♦ *The initial SF 1442 Solicitation cannot be used to create an Offer Evaluation or an award document. Both need released solicitations.*
CBD Announcement Create a Pre-Solicitation CBD Notice **Create New CBD Other Notice** CBD Number: ABC123-99-B-0014 CBD Description: CBD Pre-Solicitation Notice for Visitor CBD Type ○ Sources Sought Notice ○ Modification to Notice ⊙ Presolicitation Notice ○ Award Notice ○ Other OK Cancel	Create an Advanced or a Presolicitation CBD Announcement by highlighting the solicitation, then selecting **Procurement → CBD Announcement**. Choose the **Sources Sought Notice**, **Presolicitation Notice**, or **Other** radio button. Complete the **Create New CBD Other Notice** Window. Close and Save. **Approve** the CBD Announcement. Highlight the announcement and click the **Approval** icon. Add an Approval Sheet and **Approve**. Prepare the CBD EDI file. Open the approved CBD Announcement and go to **Prepare→Prepare**. Save the EDI file.	Contracts Three/6 SAP Three/5	♦ A CBD Announcement should be approved before submission to the Commerce Business Daily. ♦ A CBD Announcement can be prepared for electronic transmission by using the **Prepare** menu. *The CBD announcement must be approved first.* ♦ *A CBD Announcement cannot be used as the basis for a solicitation, an offer evaluation, or an award.*

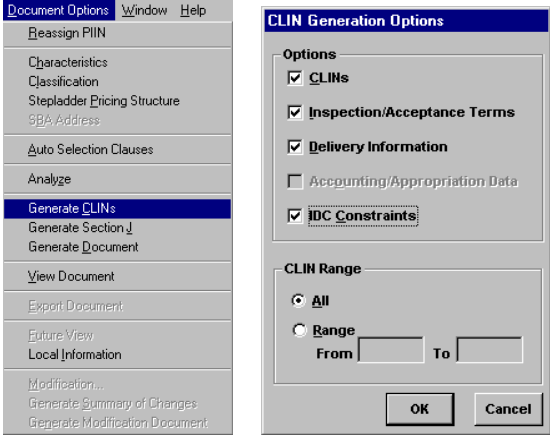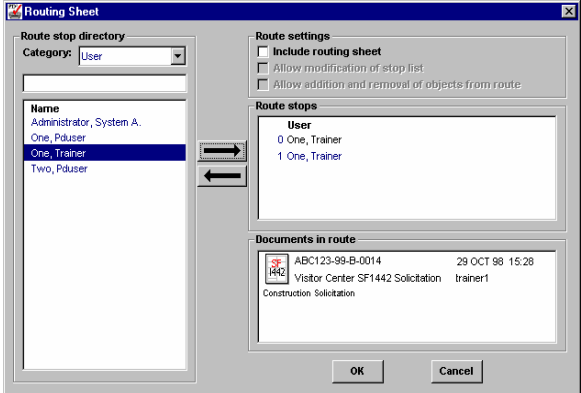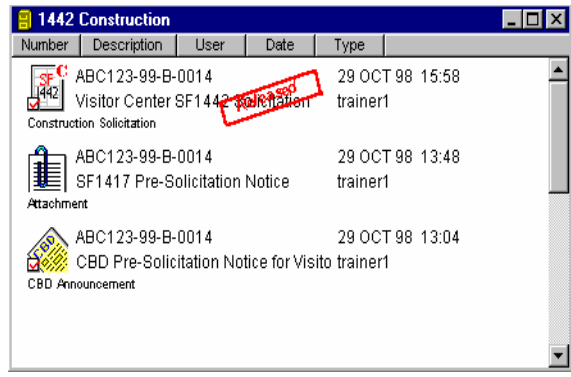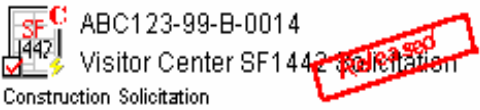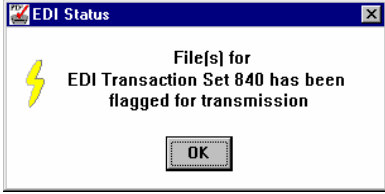| PROCUREMENT PROCESS STEPS	PD² MENU PATH/ DOCUMENT TAB	LESSON/ TOPIC #	NOTES/SHOWSTOPPERS* *(Showstoppers are in bold/italics)*
Create a SF 1417 Presolicitation Notice	Highlight the solicitation and select **Procurement → Attachment → New**. Select "Construction Contracts" from the **Template Type** drop-down list box and "SF 1417 Pre-Solicitation Notice" from the **Template** drop-down list box. Complete the **Create Attachment** screen. Click [**OK**] to open and complete the **SF 1417**. Click [**OK**] to close and save.	Contracts Four/2 For details on attachments see: Contracts Two/2 SAP Two/2	♦ The gray areas in the **SF 1417** Attachment are text form fields. Highlight the field first to properly fill out the blocks.
Create a SF 1442 Solicitation	Open the initial **SF 1442** Solicitation by double-clicking the **SF 1442 Solicitation** icon. Complete the form. Add clauses from the *Clauses* tab as required. Add text from the *Clauses* tab as required.	Contracts Four/2 For Line Item Detail Info see: Contracts Two/1 SAP Two/1	♦ CLINs from other approved PRs can be incorporated into the **SF 1442 Solicitation** from the **Line Item Summary** page by selecting **Line Items → Attach** from the **m**enu bar. ♦ CLIN cost/price information is blanked out on the **SF 1442 Solicitation** but is visible at the **Line Item Detail** level.

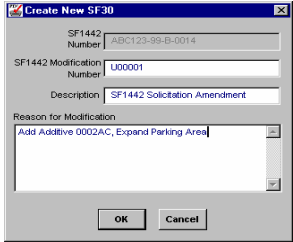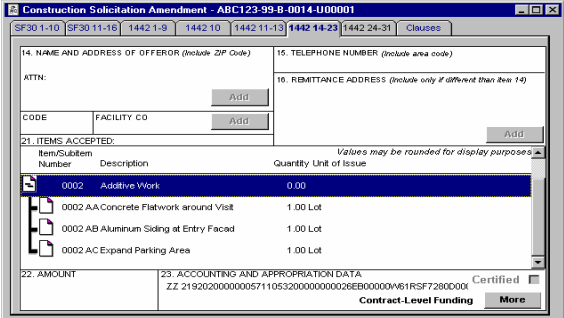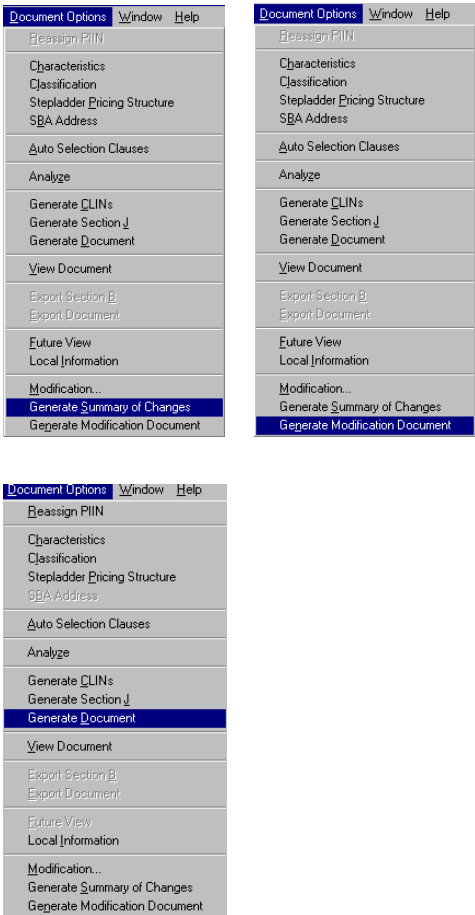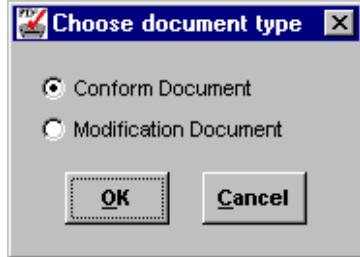| PROCUREMENT PROCESS STEPS	PD² MENU PATH/ DOCUMENT TAB	LESSON/ TOPIC #	NOTES/SHOWSTOPPERS* *(Showstoppers are in bold/italics)*
Create an SF 1442 Solicitation (Continued) 	Include Progress Payment details as required in the *Payment* tab of the primary CLIN. If Progress Payments are used, and progress is to be based on either % Completion or Milestones, a **Completion Criteria** or **Milestone** box displays. Check the box and fill out the completion criteria or milestones. Include "placeholders" for Performance and Payment Bonds in the *Payment* tab of the primary CLIN. A "Yes" in comments is sufficient to place check marks in the **Performance** and **Payment Bond** windows. Close and Save the solicitation when done.	Contracts Four/2 For Line Item Detail Info see: Contracts Two/1 SAP Two/1	♦ Another way to preserve information on Performance and Payment Bonds is to create Not-Separately-Priced CLINs for them. (Actual bond information will be added as a post-award action.) ♦ In addition, Payment Bonds can be monitored in the Delivery/Payment Tracking Source Document. The Tracking Document is presented in a later section.

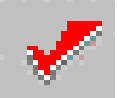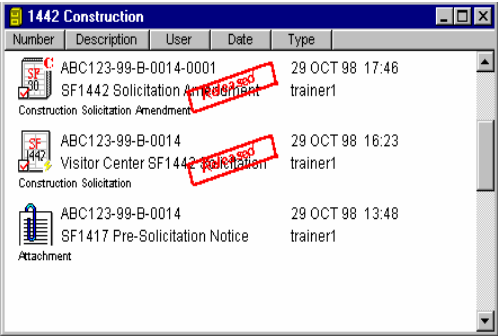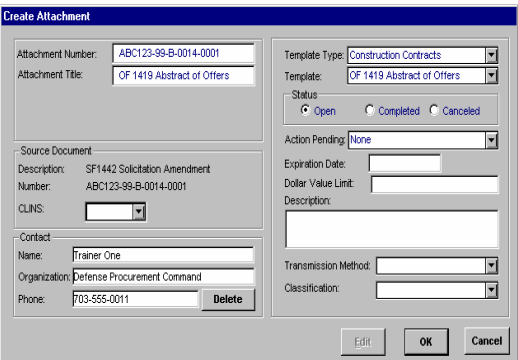| PROCUREMENT PROCESS STEPS	PD² MENU PATH/ DOCUMENT TAB	LESSON/ TOPIC #	NOTES/SHOWSTOPPERS* *(Showstoppers are in bold/italics)*
To automatically select clauses	Start by setting Document Characteristics. Select the **Document Options →Characteristics** menu to identify unique characteristics of the **SF 1442 Solicitation**. Open the folders and select the characteristics needed to pull in the desired clauses. At the very minimum: • Select the Non-SAP Characteristic, if applicable, from the **PD2 Other** folder. (PD² defaults to SAP.) • Select the **Product Type** folder and a **Product Type Characteristic** (Construction) • Change other PD² default characteristics if necessary. Other defaults are: Full and Open Competition, Performance in the USA, and Full Funding. Use the **Document Options →Classification** menu to classify and format the document. In the case of an IDIQ contract, use **Document Options →Classification** to set Contract and Order Level Minimums and Maximums and to set **Start** and **End Dates**. Click [**OK**].	Contracts Four/2 For details on Auto Selection Clauses see: Contracts Seven/2 SAP Six/2	♦ Ensure that the CLINs and the **SF 1442 Solicitation** have been filled out correctly. Clauses will be automatically selected based on data criteria (e.g., contract type, FSC and total cost) contained in the **SF 1442 Solicitation**. Additional clauses will be added as a result of your selection of characteristics. ♦ *You must select a Product Type Characteristic (e.g. PD2 Construction) and have a priced CLIN for Auto Selection Clauses to accurately select clauses for the solicitation.* ♦ *Ensure that the Non-SAP Characteristic in the Other PD2 folder is selected if appropriate. (PD² defaults to SAP.)* ♦ *Change other PD² default characteristics that do not accurately represent the solicitation; i.e., Full and Open Competition, Performance in USA and Full Funding.)* ♦ Orders against D-Type contracts will not be honored if placed before the Start Date or after the End Date that has been set in the **Classification** menu. These are constraints that PD² will hold the user to (sometimes best if left blank).

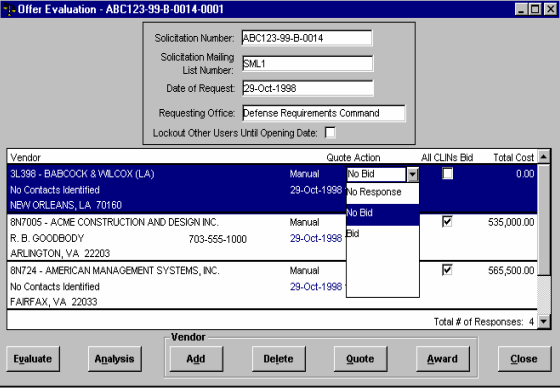| PROCUREMENT PROCESS STEPS	PD² MENU PATH/ DOCUMENT TAB	LESSON/ TOPIC #	NOTES/SHOWSTOPPERS* *(Showstoppers are in bold/italics)*
	Select the **Document Options** → **Auto Selection Clauses** menu to open the **Select Clauses** window. Options for selecting clauses that will be placed in the solicitation include: [**Select All**], [**Clear All**] or deselect (remove check-mark) clauses one-by-one. Clicking the [**Select All**] button option is recommended. Inapplicable clauses can be marked as "Not Included" in the *Clauses* tab. (See notes in the next section and in the section on Amendments). Click [**OK**]. The clauses selected will be placed into the sections selected by the System Administrator for the CSI format.		♦ *For Fill-In clauses, the grey areas to be filled in are text form fields. Highlight the field first to properly fill out the blocks. If the fill-ins are made outside of the grey area, then the filled-in information cannot be transmitted via EDI.*
Generate CLINs and Generate Document 	From the *Clauses* tab: Generate (convert to Word) CLINs by selecting **Document Options** → **Generate CLINs**. Include Inspection/Acceptance Terms, Delivery Information, and IDC Constraints (if appropriate) by placing a checkmark by the item(s**)**. Generate document. Close and Save when generation is complete.	Contracts Four/2 SAP Three/6	♦ *Do not touch the mouse or keyboard when generating*. ♦ **Auto Selection Clauses** will be reselected when the document is saved. If the **Select All** option was used, no additional clauses will be recommended unless conditions have changed. ♦ If clauses were cleared or deselected from the **Select Clauses** window, then the cleared or deselected clauses will display again in the **Select Clauses** window. Click the [**Clear All**] button or select clauses, if required, and click [**OK**] to close the document.

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Route and Approve the Solicitation	Highlight the solicitation, then select **File → Route** Depending on office policies, before routing: Add an Approval Sheet by highlighting the award, clicking the **Approval** icon, and adding the appropriate **Approval** Template. Preapproval Run a Preapproval check. Click the [**Preapproval**] button on the Approval Sheet. Highlight the solicitation, then select **File → Approvals**. Select and approve an Approval sheet.	Contracts Two/4 SAP Two/3	♦ *The solicitation must be approved before it is released*
Release the Solicitation	Highlight the approved solicitation, then select **Procurement → Pre-Award/Award → Solicitations → Release Solicitation**	Contracts Three/7 SAP Three/6	♦ Once a document is released in PD², changes to the document can only be made through an amendment. ♦ *The document cannot be released unless it was first generated.* You will be warned if there is no issue/response date; however, you can still proceed with release if the fields are not completed. Running a Preapproval check by clicking the [**Preapproval**] button will catch omissions.

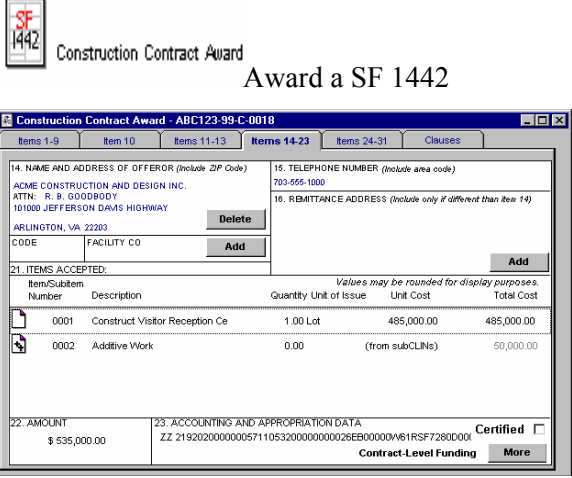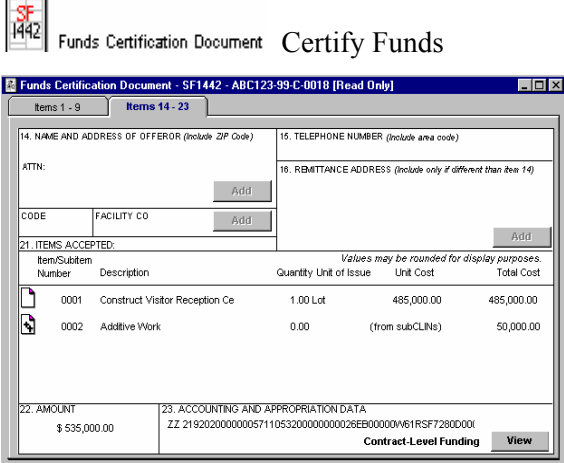| PROCUREMENT PROCESS STEPS	PD² MENU PATH/ DOCUMENT TAB	LESSON/ TOPIC #	NOTES/SHOWSTOPPERS* *(Showstoppers are in bold/italics)*
Transmit the Solicitation via EDI ABC123-99-B-0014 Visitor Center SF1442 Solicitation Construction Solicitation	Highlight the released solicitation, then **Procurement → EDI Transmit** EDI Status File(s) for EDI Transaction Set 840 has been flagged for transmission [OK] Highlight the released solicitation, then **Utilities → System Administration → EDI**. Click on the *Transmit* tab. Select the released solicitation, then click the [**Transmit**] button.	Contracts Three/9 SAP Three/7	♦ A Yellow Lightning Bolt will display on the **SF 1442 Solicitation** icon following being flagged for EDI transmission.

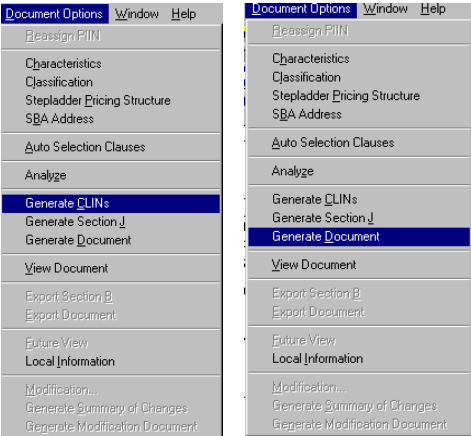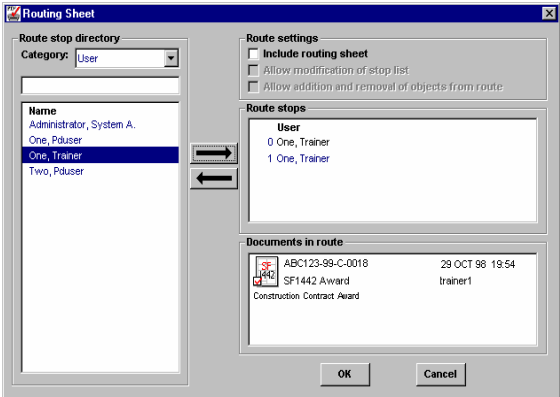| PROCUREMENT PROCESS STEPS	PD² MENU PATH/ DOCUMENT TAB	LESSON/ TOPIC #	NOTES/SHOWSTOPPERS* *(Showstoppers are in bold/italics)*
Solicitation Amendment Amend the Solicitation.	Highlight the released solicitation. Go to **Procurement →Pre-Award/Award → Solicitations → Construction Solicitation Amendment (SF 30).** Complete the **Create New SF 30** window. Click [**OK**] when done. Make the required changes to the solicitation. If IDC constraints are affected by the amendment, be sure to make changes in the **Classification** window. Select the **Document Options → Generate CLINs** menu.	Contracts Three/10 SAP Three/8	♦ *You must enter a reason for the amendment in the Create New SF 30 window to proceed.* ♦ *You must use Construction Solicitation Amendment (SF 30). Other SF 30 formats cannot be applied.* ♦ If you don't change the constraints in the **Classification** window, they will stay the same as the original contract no matter what changes are made in the Amendment or modification.

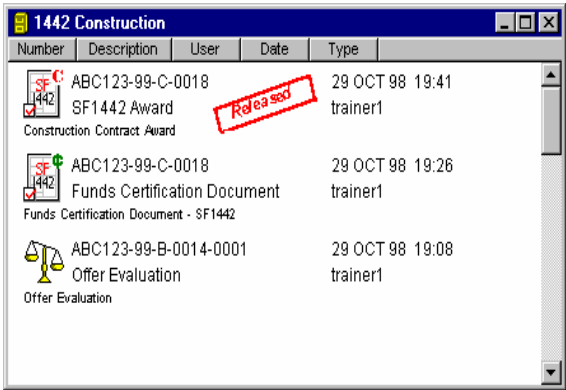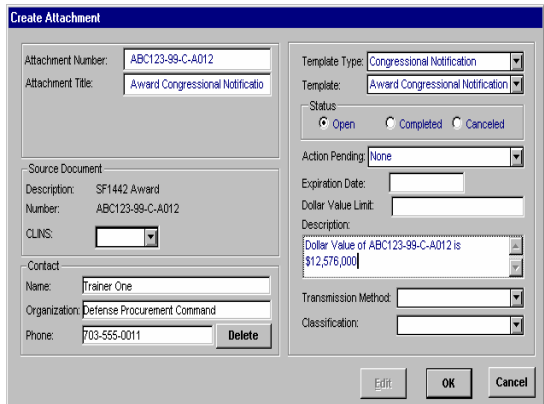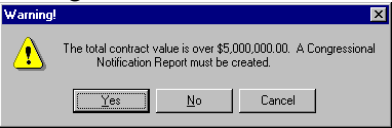| PROCUREMENT PROCESS STEPS	PD² MENU PATH/ DOCUMENT TAB	LESSON/ TOPIC #	NOTES/SHOWSTOPPERS* *(Showstoppers are in bold/italics)*
Create a Stand-Alone and Long Form Amendment	From the open solicitation amendment, select **Document Options**. A Stand-alone Amendment contains only the amendment itself plus a Summary of Changes (if the summary was generated). To create a Stand-alone Amendment: • **Generate Summary of Changes** • **Generate Modification Document** A Long Form Amendment is the Conformed solicitation with all amendments incorporated. To create a Long Form Amendment: • **Generate Document**, • **Generate Summary of Changes** • **Generate Modification Document** Close and Save. **Auto Selection Clauses** will be reselected when the document is saved. (See notes.) Take appropriate action if add or delete recommendations display in the **Select Clauses** window and click [**OK**] to close the document.	Contracts Three/10 SAP Three/8	♦ When print previewing or printing the amendment, if both a Stand-alone and a Long Form Amendment were created, you will get a choice of the viewing/printing the Modification Document (Short Form) or the Conformed Document (Long Form). ♦ The clause reselection process will not result in any additional clauses being recommended, if the conditions that were the basis for the original clause selection have not changed *and* no clauses were deselected from the *original* **Select Clauses** window. ♦ If conditions change and no clauses were deselected from the original **Select Clauses** window, **the Select Clause** window will contain only the Add and Delete clause recommendations for the changes. ♦ If conditions change and clauses were deselected, additions and deselected clauses will be commingled.

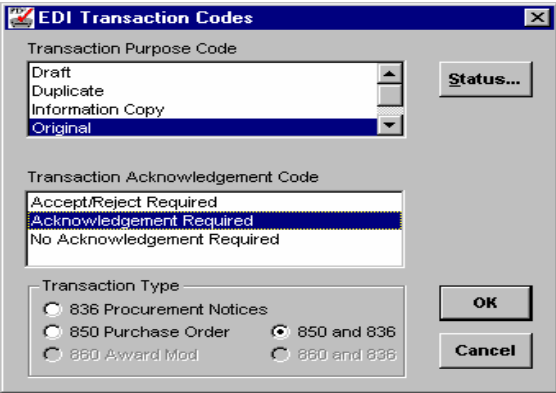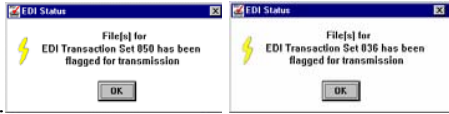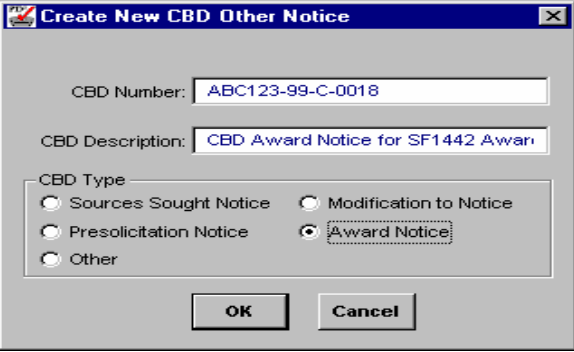| PROCUREMENT PROCESS STEPS	PD² MENU PATH/ DOCUMENT TAB	LESSON/ TOPIC #	NOTES/SHOWSTOPPERS* *(Showstoppers are in bold/italics)*
Approve and Release the Amendment	Highlight the document and **Route** for approval. (**File → Route**) **Approve** the document. Highlight the approved document and go to **Procurement → Pre-Award/Award → Solicitations → Release Amendment** The released amendment is now the conformed copy of the solicitation.	Contracts Three/10 SAP Three 8	♦ The approval and release process for an amendment is the same as the approval and release process for the solicitation. ♦ Once the amendment is released, the amendment is the conformed copy from which other documents can be built.
Create an Abstract of Offers (OF 1419)	Highlight the released amendment, select the **Procurement → Attachment → New** menu. Complete the **Create Attachment** screen. Select Construction Contracts from the **Template Type** drop-down list box. Select the **OF 1419 Abstract of Offers** from the **Template** drop-down list box. Click [**OK**] to open the **SF 1419** in MS Word. Complete the **SF 1419**. Close and return to the attachment. When prompted "Save Changes to Attachments?" click [**OK**] to close.	Contracts Four/2 For Attachments, see: Contracts Two/2 SAP Two/2	♦ The gray areas in the **OF 1419 Abstract of Offers** attachment are text form fields. Highlight the field first to properly fill out the blocks.

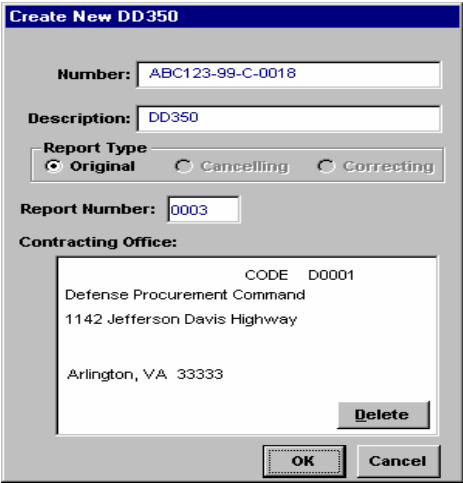| PROCUREMENT PROCESS STEPS	PD² MENU PATH/ DOCUMENT TAB	LESSON/ TOPIC #	NOTES/SHOWSTOPPERS* *(Showstoppers are in bold/italics)*
Create an Offer Evaluation	Highlight the released solicitation amendment, then select the **Procurement → Pre-Award/Award → Offer Evaluation** menu. The **Offer Evaluation** window opens and includes vendors from the SML. Add other vendors as necessary. Record Bids, No Bids and No Responses from the drop-down table in the **Offer Evaluation** window. Enter vendor prices by highlighting a vendor and double-clicking to open the **Quote Sheet** page. Complete the **Quote Sheet** page, and then highlight a CLIN to open the **Line Item Detail** window for that CLIN. Complete the **Line Item Detail** window. Repeat for each vendor. Close and Save.	Contracts Three/11 SAP Three/9	♦ *The Offer Evaluation cannot be used as the basis for creating a SF 1442 Award.* ♦ *Foreign currencies cannot be recorded in the Offer Evaluation. Foreign currency offers should be converted to U.S. dollars to record prices in the document.* ♦ *The Offer Evaluation will automatically record incoming EDI quotes from vendors. If an Offer Evaluation has not been created, the receipt of an EDI offer (843) will create an Offer Evaluation.* ♦ *The Offer Evaluation records No Response, No Bid and Bid information for Purging in the SML.*

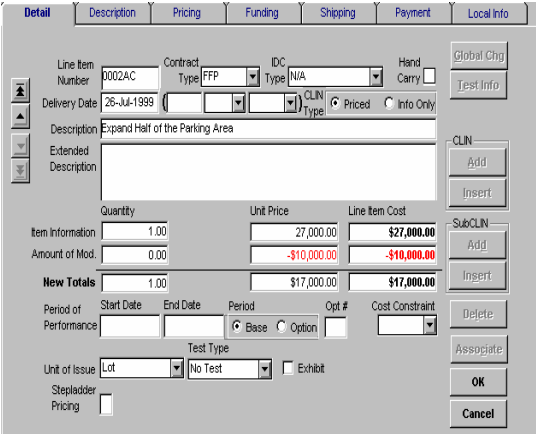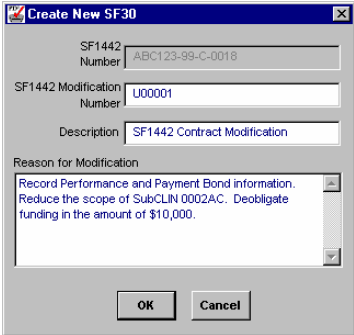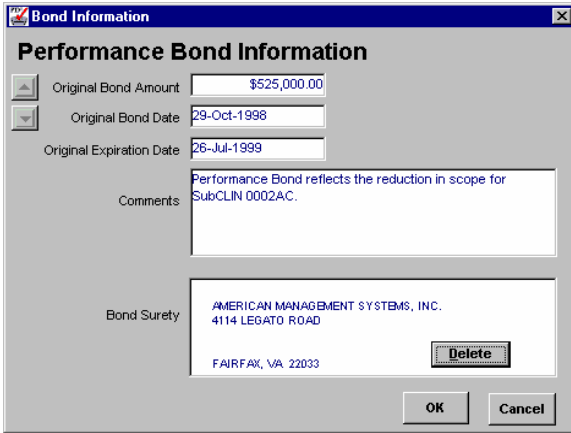| PROCUREMENT PROCESS STEPS	PD² MENU PATH/ DOCUMENT TAB	LESSON/ TOPIC #	NOTES/SHOWSTOPPERS* *(Showstoppers are in bold/italics)*
Construction Contract Award Award a SF 1442 	From the released **SF 1442** Solicitation amendment, select the **Procurement→Pre-Award/Award→Awards→Construction Purchase (SF 1442)** menu. The **Create New SF 1442 Award** window opens. *(If the contract is to be a D-type contract, now is the time to change the "C" to a "D.")* Click [**OK**]. Complete the **SF 1442** Award document. Funds Certification in Block 23 and document generation will be covered in the next section. Close and Save the document.	Contracts Four/2	♦ The SF 1442 Award can also be created as a stand-alone document. ♦ *Regardless of how the funds are certified, the certification process must take place in order to release the award. The Funds Available checkbox in Block 23 must be checked even if there are no funds applied to the contract.* ♦ *If a Funds Certification document is not used, and the funding amount on the PR is not sufficient to fund the award, then create a PR Modification (Contracts Two/5 or SAP Two/5) or unapprove the PR and increase the funding amount. An award cannot be released until the funding amount from the source document is greater than or equal to the funded amount in the Award.*

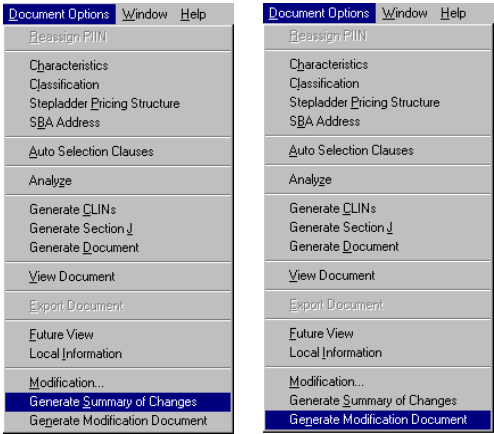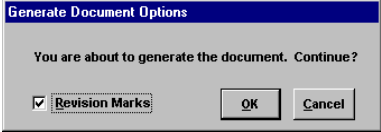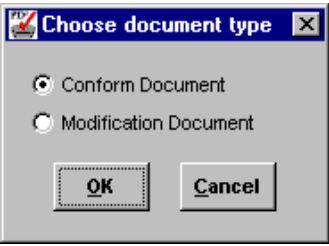| PROCUREMENT PROCESS STEPS	PD² MENU PATH/ DOCUMENT TAB	LESSON/ TOPIC #	NOTES/SHOWSTOPPERS* *(Showstoppers are in bold/italics)*
Funds Certification Document Certify Funds	Open the award and place a checkmark in **Funds Available** checkbox in Block 23, or create a Funds Certification Document. Highlight the award; go to **Procurement→ Pre-Award/Award → Certify Funds →Funding Document** Complete the Funds Certification Document. Close and Approve. Apply the Funds Certification Document to the award. Highlight the approved Funds Certification Document. Go to **Procurement→Pre-Award/Award → Certify Funds →Apply Document**. Click the [**Yes**] button for the **Overwrite** warning. The funding document has been applied. The **Funds Available** checkbox in Block 23 is now checked.	Contracts Three/15 for Funds Certification Contracts Four/2 for the award.	♦ If CLINs and/or the document have already been generated, applying the Funds Certification Document will require regeneratiang the CLINs and document.

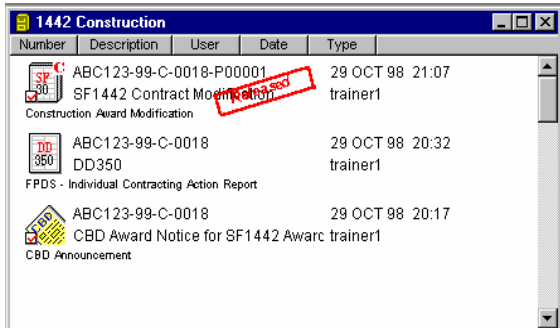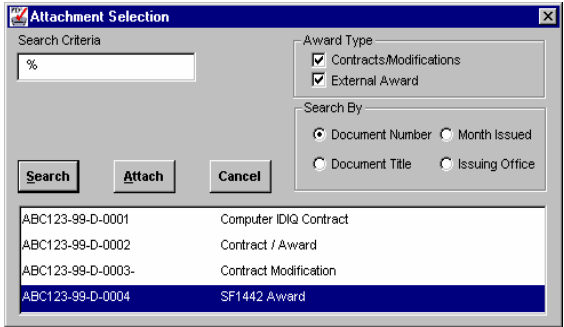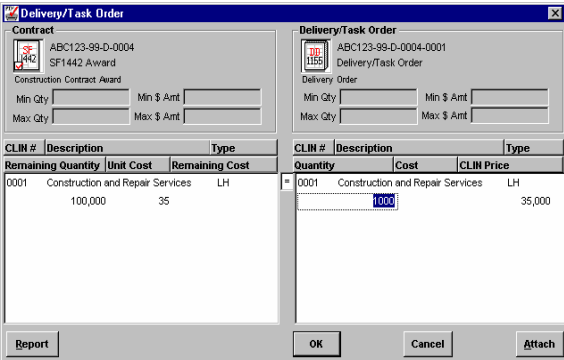| PROCUREMENT PROCESS STEPS	PD² MENU PATH/ DOCUMENT TAB	LESSON/ TOPIC #	NOTES/SHOWSTOPPERS* *(Showstoppers are in bold/italics)*
Generate CLINs and Generate the Award document	From the open **SF 1442** Award document, select **Procurement →Generate CLINs**. Include Inspection/Acceptance Terms, Delivery Information, Accounting/ Appropriation Data and IDC Constraints (if appropriate by) placing a checkmark by the item(s). Generate the document. Close and Save the document.	Contracts Four/2 SAP Three/10	♦ *Do not touch the mouse or keyboard while generating*. ♦ If the award was built from a solicitation that used **Auto Selection Clauses**, clauses will not be reselected when the document is saved unless the conditions that formed the basis for the initial clause selection have changed. ♦ If the **SF 1442** Award was created as a stand-alone document and **Auto Selection Clauses** is used, or if **Auto Selection Clauses** were rerun, the clauses will be reselected when the document is saved. (See notes on **Auto Selection Clauses** and clause reselection in the solicitation and amendment sections above.)
Route the Award for Approval	Highlight the **SF 1442** Award, then **File → Route** or click the **Route** icon. Depending on office policies, before routing: Add an Approval Sheet by highlighting the award, clicking the **Approval** icon, and adding the appropriate **Approval** Template. **Preapproval** Run a Preapproval check. Click the [**Preapproval**] button on the Approval Sheet.	Three/15	♦ *The SF 1442 Award must be approved before it is released.*

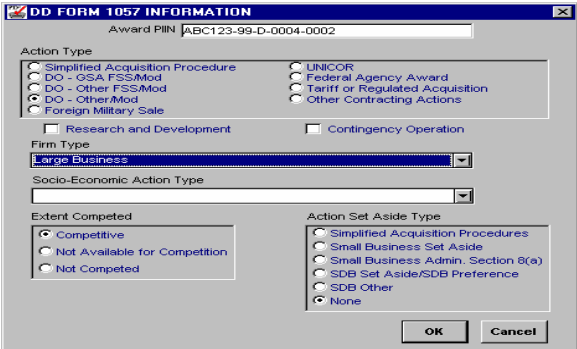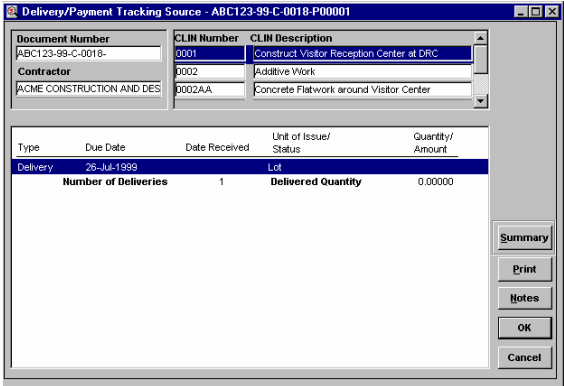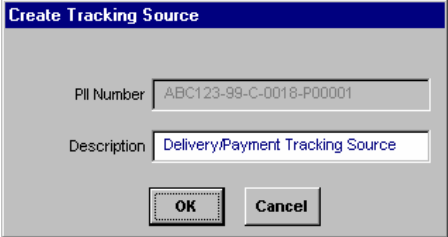| PROCUREMENT PROCESS STEPS	PD² MENU PATH/ DOCUMENT TAB	LESSON/ TOPIC #	NOTES/SHOWSTOPPERS* *(Showstoppers are in bold/italics)*
Approve and Release the Award	Highlight the **SF 1442** Award, then select **File → Approvals** or click the **Approval** icon. Complete the Approval Sheet. Click [**OK**]. Highlight the approved Award and go to the **Procurement →Pre-Award/Award →Awards →Release Award** menu.	Contracts Five/3 SAP Four/3	♦ *The Vendor must be approved before release. The System Administrator can approve the vendor anytime during the award process.* ♦ Unless registration in the Central Contracting Registry (CCR) is made a prerequisite for vendor approval by the System Administrator, *you must ensure the successful vendor is registered in CCR prior to award. PD² does not perform a check for you.* ♦ If your office has the capability (including postscript printers), PD² will automatically generate EDA compatible files for released awards and mods.
Create a Congressional Notification for an Award > or = $5 Million	When releasing an award greater than or equal to $5 million, PD² will prompt you for a Congressional Notification. Click the [**Yes**] button to create a **Congressional Notification** Attachment prior to release. To create a **Congressional Notification** Attachment after release, highlight the released award and select the **Procurement →Attachment** menu. Select Congressional Notification from the **Template Type** drop-down list box and Award Congressional Notification from the **Template** drop-down list box.	Contracts Three/14	

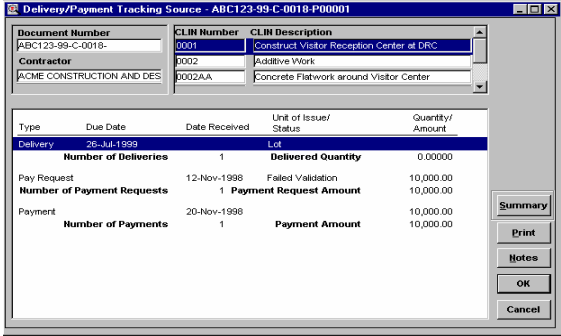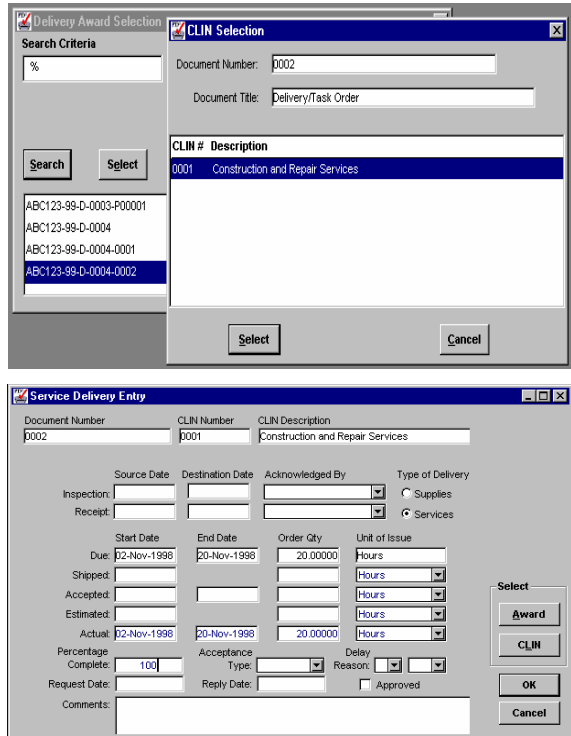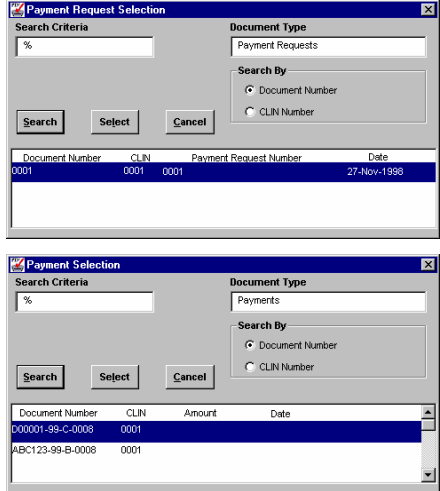| PROCUREMENT PROCESS STEPS	PD² MENU PATH/ DOCUMENT TAB	LESSON/ TOPIC #	NOTES/SHOWSTOPPERS* *(Showstoppers are in bold/italics)*
Transmit the SF 1442 Award via EDI	Highlight the released **SF 1442** Award, then **Procurement →EDI Transmit** menu. Complete the **EDI Transmission Codes** Window, including a **Transaction Type** to be created (836 and/or 850) by clicking the appropriate radio buttons. Click [**OK**] to close the following **EDI Status** windows.	Contracts Three/13 SAP Three/12	♦ A Yellow Lightning Bolt will appear on the **SF 1442 Award** icon following EDI transmission.
Create a CBD Award Notice	Highlight the released **SF 1442** Award, then select **Procurement →CBD Announcement.** Complete the **Create New CBD Other Notice** window. Close and save. Reopen the announcement; select the **Prepare →Prepare** menu. A flat file is created suitable for EDI transmission. Save the CBD file in a location specified by the System Administrator. Click [**OK**] and close the announcement.	Contracts Three/19 SAP Three/11	♦ *The CBD Announcement must be approved to prepare it for EDI transmission.*

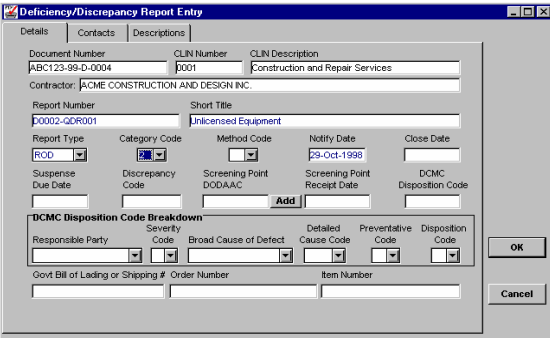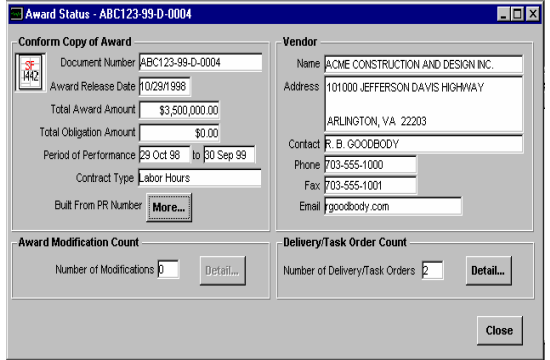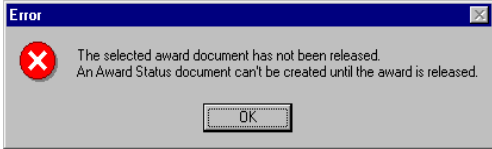| PROCUREMENT PROCESS STEPS	PD² MENU PATH/ DOCUMENT TAB	LESSON/ TOPIC #	NOTES/SHOWSTOPPERS* *(Showstoppers are in bold/italics)*
FPDS - Individual Contracting Action Report Create a DD 350 Report	Highlight the released **SF 1442** Award, then **Procurement → Pre-Award/Award → FPDS Reports → DD Form 350** The **DD 350** control number can be changed to reflect construction numbering for low dollar value procurements. Prepare the **DD 350** for EDI transmission by highlighting the signed **DD 350** and selecting **Procurement→EDI Transmit.**	Contracts Three/18 SAP Three/15	♦ The **DD Form 350** in PD² is self-validating. ♦ *The DD 350 cannot be prepared for EDI transmission until it has been signed.* ♦ *The DD 350 cannot be signed until the failed validation checks have been cleared.* ♦ *Make sure the System Administrator has complete vendor files containing Tax ID numbers, DUNS numbers, Cage Codes and other information asked for on the DD 350.* ♦ The **DD 350** pulls the obligation amount of the award from the funded amount, not the award amount. The field is editable and can be changed.

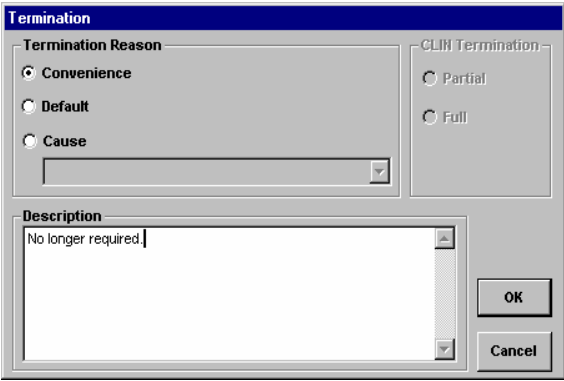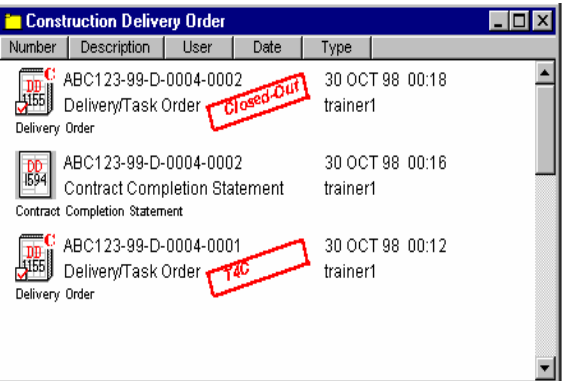| PROCUREMENT PROCESS STEPS	PD² MENU PATH/ DOCUMENT TAB	LESSON/ TOPIC #	NOTES/SHOWSTOPPERS* *(Showstoppers are in bold/italics)*
Modify the SF 1442 Award	Highlight the released **SF 1442** Award, then select **Procurement** → **Post-Award** → **Modification (SF 30)** →**Large Purchase (SF 1442)** Complete the **Create New SF 30** window. Make changes as needed in the **SF 30** Mod.	Contracts Six/1 SAP Five/1	♦ ***The Reason for Modification section in the Create New SF 30 window must be completed to create a modification***. ♦ ***A Construction Purchase (SF 1442) modification must be selected.*** Other formats cannot be applied. ♦ Modifications and amendments in PD² follow the same processes.
Modify the SF 1442 Award (Continued)	Record Performance and Payment Bond information in the *Payment* tab of the main CLIN. Close both bond windows. Close the **Line Item Detail Modification** window to return to the **SF 30**. From any tab in the **SF 30**, go to **Document Options** → **Generate CLINs**. (The **Payment Bond Information** window (not shown) is completed in the same manner as the **Performance Bond Information** window.)	Contracts Six/1 SAP Five/1	♦ Payment Bond information can also be recorded in the Delivery/Payment Tracking Source Document presented in a later section. ♦ The Performance Bond cannot be tracked in the Delivery/Payment Tracking Source document unless the Performance Bond was created as a CLIN in the contract.

PROCUREMENT PROCESS STEPS	PD² MENU PATH/ DOCUMENT TAB	LESSON/ TOPIC #	NOTES/SHOWSTOPPERS* *(Showstoppers are in bold/italics)*
Create Stand-alone Modification and a Long Form Modification	From the open **SF 30** Modification, go to **Document Options →** To create a Stand-alone Modification: ◆ **Generate Summary of Changes** ◆ **Generate Modification document** To create a Long Form Amendment: • **Generate Document**, • **Generate Summary of Changes** • **Generate Modification Document** Use revision marks, if desired. Close and Save the document.	Contracts Six/1 SAP Five/1	◆ When print previewing or printing the modification, you will get a choice of the viewing/printing the Modification Document (Stand-alone) or the Conformed Document (Long Form) if both were created. ◆ Revision marks can be used for modifications. They are not an available option for amendments.
Approve and Release the SF 30 Modification	Highlight the **SF 30** Modification. **Route** for approval and **Approve** the document. Highlight the approved document; select **Procurement→Post-Award→Release Modification** Prepare **DD 350** reports, Congressional Notifications, etc., as appropriate.	Contracts Six/1 SAP Five/1	◆ The released modification is the conformed copy to which other documents can be attached. ◆ If your office has the capability (including postscript printers), PD² will automatically generate EDA compatible files for released modifications.

PROCUREMENT PROCESS STEPS	PD² MENU PATH/ DOCUMENT TAB	LESSON/ TOPIC #	NOTES/SHOWSTOPPERS* *(Showstoppers are in bold/italics)*
Create a DD 1155 Delivery Order	Highlight an approved PR and go to **Procurement→Post-Award→FSS Order/DO/TO(DD 1155)** From the **Create New Delivery/Task Order** window, click the [**Select**] button and conduct a search for the desired **SF 1442** D-Type Contract. Double-click the appropriate contract or highlight the contract and click the [**Select**] button. The **Create New Delivery/Task Order** window opens. Click [**OK**].	Contracts Six/3 SAP Five/3	♦ The delivery order may be started by either highlighting the D-contract or by going directly to **Procurement→Post-Award→FSS Order/DO/TO (DD 1155)**
Create a DD 1155 Delivery Order (Continued)	Match the CLIN from the D-contract in the left-hand screen with the CLIN from the PR on the right-hand screen. If desired, click the [**Attach**] button to bring in CLINs from other documents. Click [**OK**] when done. Complete the **DD 1155** Delivery Order. Add an effective date. Certify funds in Block 17. Make other entries as necessary. **Generate CLINs** and **Generate Document**. Approve and Release the delivery order.	Contracts Six/3 SAP Five/3	♦ The matching window works from left to right. Highlight the CLIN on the Contract side first, and then highlight the CLIN from the PR. ♦ *Be careful to avoid mismatches. You can match a CLIN in a contract with the wrong CLIN in a PR.* The CLIN being matched to the contract has to be the same type of contract. (e.g., *you cannot match a Labor Hour CLIN with a FFP CLIN).* ♦ Release the Delivery Order by: ⇒ Highlighting the DO ⇒ **Procurement →Pre-Award/ Award→ Awards →Release Award** *The DO is not released as a Post-Award modification action*.

PROCUREMENT PROCESS STEPS	PD² MENU PATH/ DOCUMENT TAB	LESSON/ TOPIC #	NOTES/SHOWSTOPPERS* *(Showstoppers are in bold/italics)*
Prepare a DD 1057 Feeder Sheet	Highlight the award, modification or delivery/task order, then select **Procurement→DD 1057 Feeder Information** Complete the report and click [**OK**].	Contracts Six/3 SAP Three/15	♦ The **DD 1057** Feeder Report uses the funded amount, not the award amount, to report the value of the award. Follow office policies on making sure the funded amount and the amount of the award are the same prior to reporting.
Create a Delivery/Payment Tracking Source Document	Highlight the award, modification or delivery order. Go to **Procurement→Post-Award→ Tracking Source** The **Create Tracking Source** window opens. Click [**OK**]. The **Delivery/ Payment Tracking Source** window opens.	Contracts Six/7 - 8 SAP Five/4	♦ Deliveries, Payment Requests, Payments and Bond Information can all be recorded within the Tracking Source Document, once the document is created. ♦ Delivery reports, reports of payment requests, and payments made as stand-alone reports will feed into the Tracking Source document if one exists for the action in question. ♦ The only Bond that can be recorded in the **Tracking Source** document is the **Payment Bond.**

PROCUREMENT PROCESS STEPS	PD² MENU PATH/ DOCUMENT TAB	LESSON/ TOPIC #	NOTES/SHOWSTOPPERS* *(Showstoppers are in bold/italics)*
Record Delivery, Payment Request, and Payment Information	From the Delivery/Payment Tracking Source document, highlight the CLIN being reported on. Double-click the CLIN to open the *Tracking Source Detail* tabs. Complete the tabs as events occur.	Contracts Six/7 - 8 SAP Five/4	
Record Delivery/Payment Info Independently.	With no document highlighted: Go to **Procurement → Post-Award→ Delivery→Add Delivery** The **Delivery Award Selection** window opens. Conduct a search, highlight the appropriate award, and double-click to open the **CLIN Selection** window. (Or click the [**Select**] button.) In the **CLIN Selection** window, highlight the CLIN the delivery report is for and double-click. The **Supply Delivery Entry** window opens. Make entries and click [**OK**]. Open the Tracking source document for the action for which the independent delivery report was made. Click [**OK**] when done. To view all Delivery Reports, go to **Post-Award→ Delivery→Modify Delivery menu**. Conduct a search to view reports.	Contracts Six/7 - 8 SAP Five/4	♦ If a Delivery/Tracking Source Document has been created for the action in question, the Delivery Report also will feed information into the Tracking Source Document. ♦ The **Payment Request** and **Payment** Menus work the same as Delivery.

PROCUREMENT PROCESS STEPS	PD² MENU PATH/ DOCUMENT TAB	LESSON/ TOPIC #	NOTES/SHOWSTOPPERS* *(Showstoppers are in bold/italics)*
Create a Discrepancy Report	With no document highlighted, go to **Procurement→Post-Award → Discrepancy Report→Add Discrepancy Report** Find the award/modification in question and **Search** for the action in question. Fill out the details of the deficiency/ discrepancy and click [**OK**].	Contracts Six/7 - 8 SAP Five/4	♦ Discrepancy reports do not feed into a Tracking Source Document. ♦ The initial Discrepancy Report is created in **Add Delivery Report**. The **Modify Discrepancy Report** menu contains all reports for review/edit. ♦ In addition, a Deficiency/Discrepancy Summary Report can be created.
Determine the status of the Award	Highlight the award or modification and go to **Procurement → Post-Award → Award Status. The Award Status** window opens. Click the [**More**] button to see the PR and solicitation from which the award was built. Click the [**Detail**] button located by the **Award Mod Count** check box to see modification details. Click the [**Detail**] button located by the **Delivery/Task Order Count** check box for DO/TO details.	Contracts Six/4 SAP Five/5	♦ *The award, modification or DO/TO must be released to run an Award Status Report.*

PROCUREMENT PROCESS STEPS	PD² MENU PATH/ DOCUMENT TAB	LESSON/ TOPIC #	NOTES/SHOWSTOPPERS* *(Showstoppers are in bold/italics)*
Mark the Document as Terminated	Highlight the document that has been terminated and go to **Procurement** →**Post-Award** →**Termination** →**Terminate** Complete the **Termination** window. The document stamp is changed from **Released** to **T4C**.	Contracts Six/10 SAP Five/8	♦ *The Termination menu cannot be started from a modification; it must start from the main award.* ♦ The **Termination stamp** is just a stamp. The actual termination must be accomplished by a termination modification.
Closeout the Contract or Delivery Order	Highlight the conformed version of the document to be closed out and enter a **Final Payment Date**. (**Procurement**→**Post-Award**→ **Closeout** →**Payment Schedule**) From the highlighted document, complete a **DD 1594** from the **Closeout** menu. If required, complete a **DD 1597**. Go to **Procurement**→**Post-Award**→ **Closeout**→**Closeout Award**.	Contracts Six/11 SAP Five/9	♦ *Closeout must occur from the conformed document; i.e., the last modification of an award that has been modified.* ♦ *An award cannot be closed out without a final payment entry.* ♦ *An award cannot be closed out without a signed Contract Completion Statement (DD Form 1594).* ♦ The System Administrator can reactivate a closed-out contract. ♦ The System Administrator can establish automatic close out criteria for a variety of contract types and dollar values.